

Electronic Plan Room Specification Document Creation Instructions

These instructions are designed to assist you in creating the Project Specific set of Special Provisions.

To do that five areas are addressed.

- Converting WordPerfect Special Provisions to Microsoft Word format in the required template.
- General MSWord highlights.
- Inserting non-compliant Microsoft Word Special Provisions into the required template.
- Creating the Project specification file to include the Table of Contents and Special Provision documents.
- Creating the pdf file.

Converting WordPerfect Special Provisions

1. Open WordPerfect file in WordPerfect. Opening in MSWord and letting Word do the conversion does not work properly.
2. Known problems that transfer from WordPerfect to Word.
 - a. Automatic paragraph numbering. Use tabs and indents along with required paragraph numbers and bolding as needed. Start at the bottom and work up, removing all automatic paragraph and outline codes.
 - b. Footers (Remove. Can be created again in Word.)
 - c. Bookmarks (Remove all.)
 - d. Index codes (Remove all.)
 - e. Hard page breaks (Remove all. Let the document free flow. Fix structure later in Word.)
 - f. Margin codes that change default at start of document and changes within document. (Remove all.)
 - g. In Reveal Codes, the very first code is "Open Style: DocumentStyle." Suggest double click on this codes. If any codes appear in the "Contents" portion of the box delete them. This will automatically remove any margin codes at the start of the document.
3. Can clean up WordPerfect file before saving as Word, but can wait to see how file works in Word. More on this during the "Inserting Non-Compliant Files" portion of this training. If you clean up the WordPerfect file, suggest doing it in a copy, not the original version of the file. This allows you the opportunity to check the original or revert back to the original in case of problems.
4. Save As with File Type set to MS Word for Windows 97
5. Select a location to save the file and Save
6. Close document
7. Repeat steps 1 – 6 until all desired WordPerfect files have been saved as Word files.

8. Because of the wide variety of files created over the last several years we can't guaranty all files will convert properly. If problems occur with the WordPerfect files, we highly suggest using the Master Template and retype the Special Provision from scratch and then format the specification as shown below. The main problem is in Word, when inserting files as described below, the footer page numbering is incorrect.
9. Formatting in MSWord using Master Template will be covered below.

General MSWord Highlights

Accomplish steps 1 – 4 on each PC being used to convert WordPerfect files or process/create Word files for use in the EPR process. Steps 5 – 7 are training demonstration steps only.

1. Open File. Use the Master Template File
2. Select Tools, Options
3. Set Style Area Width to 0.75 inches (This allows you to view paragraph style settings that are critical to the creation of a proper pdf file.)
4. Select File, Page Setup
 - a. The four main margins should be set to one inch and gutter to 0..
 - b. The Header setting should be 1.0 inch and Footer setting 0.5 inches. If while viewing a specification, the footer location appears to be set incorrectly check here and reset if needed.
5. Select Insert, Break to check out various options. The first option in the second section is the main one used to create Word compliant specifications and the Project set of specifications. Cancel option to close dialog box.
6. Select View. The Normal, Print Layout, and Header and Footer options are important options in the proper formatting of specifications.
 - a. The Normal option shows a continuous text view with page and section break coding in addition to the style settings referenced above. Headers and Footers are not visible.
 - b. The Print Layout shows each page with the Header and Footer visible.
 - i. Text can be edited from either this view or the Normal view.
 - ii. By double clicking on the footer you enter the Header and Footer view and can edit the footer or scroll to and create/edit the header.
 - c. The Header and Footer view can also be entered from the View menu.
 - i. When in this view an applicable tool bar becomes available.
 1. You can set page numbering, date/time options, or move between headers and footers.
7. If some settings are incorrect it may take trial and error to correct them.

Inserting non-compliant files into Master Template

1. Open template and Save As with new file name
2. Control, End to get to end of document. (Extra coding has been added so proper footer comes in with Insert in step 3)
3. Insert required doc file
4. Control, Home
5. Highlight (block) introduction text on page 1. Press Delete key. If the first page is now blank, Press the Delete key one more time. Removes Intro text and Next Page break that was part of template file. The desired page one of your document should now be page one of the file.
6. Check file in Print Layout view for proper footer and margins.
 - a. If footer was removed from the WordPerfect file there will not be a footer in this file.
 - b. To add footer
 - i. Select the Header and Footer view
 - ii. Enter required information and proper format. (Use a good file as an example.)
7. In Normal View
 - a. Page breaks that are put in during the conversion from WordPerfect to Word can be a problem.
 - b. Scroll the document:
 - i. May have to remove extra tabs/spaces from Section Number and Title lines.
 - ii. Remove all hard page breaks. Don't worry about page flow at this time. Page Breaks can be added later (Control – Enter keys). This is different from the Next Page breaks that are needed between all files that are inserted.
 - iii. Apply needed Heading 1, 2, 3, and 4 styles as needed for “S” Special Provisions. For “M” Special Provisions, only Heading 1 and 2 are required. Can use Headings 3 and 4 if desired. (Heading 1 for Section Number and Special Provision Text, Heading 2 for Title, Heading 3 for Part 1, 2, & 3 lines, and Heading 4 for main articles, 1.1, 1.2, 2.1, 2.2, 3.1, 3.2 for example)
 - iv. While doing this, check article/paragraph numbering/tabs and correct as needed. (Depending on how the original Special Provision was created, applying Heading 4 may change for example, **1.2 Related Sections** to **Related Sections** without the article number. Type in correct paragraph number.)
 - v. While applying Heading styles check the styles for all other lines. All should be normal. However because of the methods used to create Special Provisions in the Regions, additional paragraph coding may appear. If “Date” line has a Heading applied, change it to normal and align as

- needed. Some Specials have a Heading for the “Date” set, while others do not.
- vi. Other coding, “Quick A” or “Body Text” for example may be ignored. In the body of the Specification, all Heading codes not specified in step 7b iii should be set to “Normal.” Tabbing should be adjusted as needed.
- c. Try to keep paragraphs together but not required.
- d. Don’t have Part 2 heading at bottom of page and first article on the next. The same applies for some articles, 2.1 for example.
- 8. Remove WordPerfect created bookmarks so the PDF file creates properly.
 - a. Select Insert, Bookmark (If no bookmarks appear, Cancel)
 - b. Highlight bookmark, click Delete
 - c. Repeat until all bookmarks have been deleted
- 9. Repeat process for each required file until all required files are template compliant.
- 10. Check out Heading codes in Word to see if they are set properly for Adobe Acrobat.
 - a. From View menu, select Document Map. **(Note, the Standards Section just learned about the use of the Document Map.)**
 - b. Left pane that appears works similar to the Bookmark pane in Acrobat.
 - c. Flow of the links has extra line(s). Most likely a Heading code was set to a blank line.
 - i. Click on the space to go to the location in the document.
 - ii. Set coding to Normal.
 - d. Item appears at the wrong level. For example, a Heading 2 items is aligned to the left similar to a Heading 1 or a Heading 3 looks like a Heading four.
 - i. Click on the line to go to the location in the document.
 - ii. Set coding to proper Heading level.
 - e. This can also be checked in Adobe but this method saves a considerable amount of time.

Creating the Project Specifications File (Bid Book)

1. Open the desired Table of Contents Word file (Federal Blue, Federal Purple w/plan sheets, Federal Purple, State Green, State Orange, State Red, State Purple w/plan sheets, and State Purple version as needed)
 - a. Table of Contents files have been formatted using the Master Template.
 - b. Table of Contents files include all items that are not project specific so that designers do not have to add these standard items.
2. Save As with Project identified file name
 - a. Save often throughout process
3. Select View, Print Layout
4. To add Special Provisions, Control – End to get to end of document
5. Insert Break, Next Page at end of document (Not needed when adding the first Special Provision. Each TOC file has the first break already in place.
6. Insert first/next Special Provision or required file
7. Scan added information for correct format

- a. If original file was correct to start then file should import properly.
8. Check footer for proper Section number and page numbering
 - a. If original file was correct to start then the footer should be correct if step 5 completed.
 - b. Some files that appeared to be in the correct format individually when inserted have the wrong footer. This is related to the discussion in “Converting WordPerfect Special Provisions” step 2.
9. Repeat steps 4 through 9 until complete.
10. Responsible person, Create PDF file per instructions.
11. Accomplish Step 10 in “Inserting non-compliant files into Master Template” to check out Heading codes in Word to see if they are set properly for Adobe Acrobat.

Creating the PDF File (This part only for person tasked to create pdf files.)

1. If using Windows 2000, Word file being used to create the pdf file may have to reside on “C” drive during the pdf file creation process. The created pdf file should reside in the same location. Prior to and after creation of the pdf file the file location does not seem to matter. UDOT testing indicated that files may have to be on “C” drive when step 15 accomplished. Some files created properly and some did not when accessed from a network drive. If after creating the pdf file check the file size. If the file size is 0kb then the Project Word file and subsequently created PDF file must be on a local drive.
2. Adobe Acrobat must be installed on the PC
 - a. When installed the Custom option must be selected so that the PDF Writer files are properly installed.
3. In Word, if Acrobat does not appear on the right side of the menu bar and two Adobe icons (Convert to Adobe PDF & Convert to Adobe PDF and Email) are not on the toolbar accomplish steps 4 through 8. Otherwise continue at step 9.
4. Select Tools, Templates and Add-Ins
5. If not checked, check PDFMaker.dot and click OK
6. If option not available contact ISS Tech and have Adobe Acrobat reinstalled using the option in step 2a.
7. After clicking OK to turn on PDFMaker.dot, the Acrobat dropdown menu and two icons should be available.
8. Steps 3 through 7, except 6, may have to be accomplished each time Word is started.
9. Select Acrobat, Change Conversion Settings (Once set these should not change even if step 8 applies.)
 - a. Select Security Tab
 - i. No options should be selected.
 - b. Select Office Tab
 - i. Under General, All checked except Save File Automatically
 - ii. Under Word Features, All checked except Page Labels option
 - iii. Under Document Tag, Check Embed option
 - c. Select Bookmark Tab
 - i. Check Convert Word Headings to Bookmarks
 - ii. Do not check Convert Word Styles to Bookmarks
 - iii. Set Magnification to Inherit Zoom
 - iv. Check Headings 1 through 5
 - v. Uncheck all other options
 - d. Select Display Options Tab
 - i. Under Document Open Options, select Bookmarks and Page
 - ii. Set Default for Open Magnification
 - iii. Default settings for remaining options
10. This completes initial set up of MSWord for creation of Adobe Acrobat PDF files.
11. After Project Specification file has been compiled as one Word file continue.

12. If using Windows 2000 copy Project Specification file to pre-determined “C” drive location if applicable portions of step 1 apply.
13. Open Project Specification file
14. Accomplish step 8 as required.
15. Click the Convert to Adobe PDF.
16. Save As PDF file to desired location with desired file name.
 - a. This process may take time, depending on the size of the Project.
 - b. If using Windows 2000 the file may save to a different location, with a different name. We have not been able to isolate the problem, but it could be related to either file name or file size.
 - c. If the file does not appear in the selected location, check in c:\Documents and Settings\YOUR ID\Local Settings\Temp for a file name that begins with ACR.
17. Open file in Adobe Acrobat
 - a. If file was saved as described in 16c, there may be two files created at the same time. One has the bookmarks and bookmark pane and the other does not. Use the bookmarked version.
18. Select File, Document Properties, Open Options (This step has no impact on the display of the Bookmark pane referenced in step 19 as long as the Initial View shows Bookmarks and Page turned on. This was a setting in Word from step 9di.)
 - a. Set page layout to Single Page.
 - b. No other changes needed.
 - c. Click OK and Save document.
 - d. Close and reopen document for change to take effect.
19. Bookmark pane should be visible on left side of screen with document on the right.
 - a. All headings that were set in each Word file should have created the necessary bookmarks and file structure.
 - b. If bookmarks do not have the correct layout, either missing or extra bookmarks, the Project File should be corrected.
 - i. If all steps of “Inserting non-compliant files into Master Template” were accomplished properly and only the required Heading styles applied there should not be any problems.
 - c. If there are bookmark problems accomplish step 7, with emphasis on 7b v and vi in the “Inserting non-compliant files into Master Template” procedure.
20. Click the “minus” symbol at the Section Number level to collapse each Section’s bookmarks so only the Section Number for each specification is visible. The user can click the “plus” symbol to expand as needed.

This portion of the process is now complete.

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